

Evergreen Cataloging Working Group (CatWoG) Meeting Minutes

Date/Time: Wednesday, July 21, 2010 / 9:00 am – 2:45 pm

Location: State Library

Attendees:

- Anderson – Lynn Floyd, Susan Manalli, Melissa Franks
- Beaufort – Brendagael Beasley-Forrest
- Calhoun – Merle Govan
- Dorchester – Anne Patrick, Sue Card, Kathy Walters
- Fairfield – Margot Kuebler
- Florence – Rogan Hamby, Tim Anderson
- SCSL – Wesley Sparks, Chris Yates
- York – Shasta Brewer, Ruth Canfield, Colleen Kaphengst

Agenda:

- I. **Quality Control** – Colleen Kaphengst (York)
- II. **De-duping Project** – Rogan Hamby (Florence)
- III. **Evergreen 1.6** – Rogan Hamby (Florence)
- IV. **Evergreen Display Issues** – Lynn Floyd (Anderson)
- V. **Database Clean-up** – Shasta Brewer, Ruth Canfield (York)
- VI. **MARC Records : Question & Answer** – Shasta Brewer, Ruth Canfield (York)

Minutes:

I. Welcome

Shasta Brewer (SC LENDS Cataloging Working Group Co-chair) welcomed attendees and outlined the meeting agenda.

II. Quality Control – Colleen Kaphengst (York)

On behalf of the SC LENDS Advisory Committee, Colleen gave a brief presentation on quality control as it relates to SC LENDS bibliographic database and cataloging standards.

- When the SC LENDS consortium was formed, the Advisory Committee approved the formation of a union catalog which would adhere to AACR2 and MARC cataloging standards. Member libraries would no longer be able to use local, non-standard cataloging practices as those make the de-duping and merging process more difficult during migration and as new libraries join SC LENDS.
- The Advisory Committee continues to stress the importance of following standard cataloging practices, especially since more South Carolina library systems (currently five systems representing seven counties) are expressing an interest in joining the consortium. CatWoG may need to create a checklist of cataloging standards for libraries requesting to join SC LENDS. The checklist would help these libraries check their existing databases for non-standard practices which may cause problems during their migration to SC LENDS.
- York County has been charged with the oversight of quality control of the SC LENDS bibliographic database.
 - Quality control consists of checking for/noting consistent (1) non-standard cataloging practices and (2) errors in MARC records and making certain that catalogers are notified so these practices/errors can be corrected.

- Quality control does not include training SC LENDS catalogers.
- All SC LENDS used non-standard cataloging practices before joining the consortium in order to make it easier for patrons to find information/items and to work around glitches in their ILS systems. Consequently, there will be many older records in the database that reflect these previous practices.
- If multiple libraries are using the same non-standard practice, the oversight group will post a message to the CatWoG listserv describing the issue and providing information about the standard cataloging practice which needs to be implemented.
- If one library consistently uses the same non-standard practice or makes the same errors, the director of that library will be notified and asked to discuss the problem with the appropriate staff member(s).
- Following accepted standards can make cataloging easier and provides a way to help establish cataloging processes and procedures.
- Additional suggestions for maintaining quality control:
 - Creating a **Help Desk** for catalogers.
 - Cataloging questions can be posted anonymously to the help desk.
 - CatWoG members agreed that they would like a help desk, so Shasta will check with Systems Admin staff at York County Library about setting one up.
 - **Post meeting note:** Greg DeAngel, WebMaster at YCL, has created a CatWoG help desk. It is being tested and reviewed and should be available soon.
 - Training in the form of mini-workshops.
 - Colleen suggested that mini-workshops could be held following CatWoG meetings.
 - The mini-workshops would address one topic per session.
 - CatWoG members interested in the training could stay for the session. Other members would be free to leave since the general CatWoG meeting would have concluded.
 - CatWoG members also agreed that they liked this idea, but specific plans were not made for creating these workshops.

III. De-duping Project – Rogan Hamby (Florence)

After all SC LENDS libraries went live on Evergreen, both library staff and patrons noticed many duplicate records (i.e., records which should have merged during the migration process but did not because ESI's merging algorithm was too strict). The Advisory Committee appointed **Rogan Hamby**, **Lynn Floyd**, and **Shasta Brewer** to work on a new de-duping project in an effort to merge at least a portion of the duplicate records.

Rogan provided an overview of the project.:

- De-duping Process – Beginnings
- Project Goals
- Scope
- Two Types of Match Points
- Modeling and Match Points (Parts 1 – 3)
- Importance of Being Earnest
- Imperfect World
- Throw the Dice

- Normalization

Post-meeting note: Rogan has posted his presentation on the wiki (<http://scln.statelibrary.sc.gov/index.php?title=Cataloging>) under **Meetings and Minutes**
> **De-dupping Presentation done by Rogan at July 21st Meeting.**

The project was deemed a success due in part to the large number of records merged for the cost:

- 326,098 bib records were merged (27% of the ISBN-based collection)
- Cost/record = 1.5 cents

IV. **Evergreen 1.6.1 – Rogan Hamby (Florence)**

SC LENDS members who attended the Evergreen Conference in April attended a presentation previewing newer versions (e.g., 1.6, 2.0) of Evergreen. In the near future, SC LENDS will upgrade from version 1.4 to version 1.6.1.

- **Evergreen 1.6.1**
 - Will be on the SC LENDS test server by August 16, 2010.
 - SC LENDS will be the first system to use this brand new version of Evergreen.
 - Contains small changes and bug fixes.
 - Includes a programmable events function.
 - Has a new OPAC interface (Craftsman).
 - Includes the Acquisitions module in preview mode (i.e., it is not fully functional and should not be used for ordering).
 - Lacks documentation.
- **Evergreen 2.0**
 - King County (Washington state) will go live on 2.0 on September 25, 2010.
 - SC LENDS is scheduled to upgrade to 2.0 in the first or second quarter of 2011.
 - Includes major changes throughout the Staff/Client interface.
 - Includes big “back end” changes.
 - Has a Serials module.
 - Has an Acquisitions module.
 - Includes Patron Buckets.

V. **Evergreen Display Issues – Lynn Floyd (Anderson)**

The manner in which some information is displayed and the way screens are laid out in Evergreen 1.4 can be confusing and aesthetically unpleasing. Because of display issues, an **OPAC Committee**, chaired by **Lynn Floyd (Anderson)**, was established to redesign the SC LENDS OPAC. Lynn discussed the potential changes and gave CatWoG a preview of the King County 2.0 Evergreen demo.

- The committee will base the OPAC redesign on the Craftsman interface used in newer versions of Evergreen.
 - Craftsman includes a bib template which can be configured to hide blank fields on and add additional fields to the title record screen.
- The main goal of the redesign is to make the OPAC as useful as possible.
- The changes will make the OPAC fit SC LENDS’ needs and wants.
- The changes will be done on the test server first.
- All the changes will need the Advisory Committee’s approval.

- Staff members may email **Lynn (lfloyd@andersonlibrary.org)** with suggestions of things they want or think should be addressed on the OPAC.

VI. Database Clean-up – Shasta Brewer, Ruth Canfield (York)

▪ **Main questions:**

- How do we move forward with more clean-up since the completion of the de-duping project?
- How do we prevent adding more new errors to the system?

▪ **Decisions:**

- The cataloger finding a bibliographic error should be the one to fix it.
- Catalogers should post errors (e.g., poor merges) to the list so (1) designated SC LENDS members can keep track of them as part of a checklist for future merges/migrations and (2) corrections can be made.
 - If patterns are noted, SC LENDS systems administrators may be able to fix problems through automation.
 - The cataloger who finds a poor merge should download a new MARC record, if necessary, and post the information to the listserv so other catalogers can move their holdings to the correct bib record.
- It is now permissible for catalogers to merge records which are obvious duplicates that did not merge during the de-duping process for some reason.
- It is permissible to delete bibliographic records (i.e., to set them to “inactive”)
 - If a bib record has no holdings, catalogers should check the last edit date and the item publication/copyright date and use their judgment to decide whether or not to delete the record (i.e., decide if anyone else will need to use the record).
 - If a bib record has no holdings and is a very poor MARC record, catalogers should check the last edit date and the item publication/copyright date and, in most instances, delete the record.
 - Catalogers should try not to delete item barcodes if they know the items were checked out and returned that same month. If items are deleted in the same month in which they circulated, circulation stats are skewed (i.e., the system removes the circulation stat for that item).

VII. MARC Records: Question & Answer – Shasta Brewer, Ruth Canfield (York)

The following specific cataloging issues were discussed:

- Indicators for children’s items with LC subject headings.
 - Indicator should be **0** for LC subject headings with **\$v Juvenile literature** or **Juvenile fiction**.
 - Indicator should be **1** for LC children’s subject headings.
- ISBNs
 - For sets:
 - Use the ISBN for the set in the 020 tag.
 - Put the ISBN for parts (e.g., ISBNs for individual episodes) in the notes field.
 - Remove the ISBN for the set if the items have been cataloged individually as opposed to part of a set.
 - Binding/edition information (e.g., hardcover, paperback) found in parentheses after the ISBN in the 020 tag does not need to be added but can remain if it present.

- There are no standards for formatting/listing this information (e.g., “hardback” may be shown as hardback, hc, hbk, lib. bdg. etc.)
- Catalog multi-media sets as kits and use the gmd \$h [kit].
 - Hardcover and paperback items on same bib record:
 - **Mass market paperbacks** usually require a separate bib record from the hardcover and/or trade paperback bib record.
 - Check the **pagination, publication date, publisher**, and **size** in order to determine whether or not to add mass market holdings to an existing record.
 - If two items with different bindings have the same pagination and publication date but one lists the corporate publisher and the other lists an imprint or subsidiary publisher, both items can be added to the same record using the corporate publisher’s name in the 260 tag, \$b.
 - 533 tag = reproduction note.
 - Catalogers may add “published by” notes if they want to include the name of the imprint or subsidiary publisher.
 - Searchable fields
 - 710 corporate author information is not currently being retrieved during author searches. This is a mapping issue, so a work ticket will be created and sent to Equinox in order to have the issue resolved.
 - If other fields do not show up in results from a keyword or other type of search, please post these examples to the listserv.
 - DVDs
 - To keep records from merging incorrectly in the future, catalogers may need to put the “season number” as part of the title in **245 \$a** or in **\$b** instead of putting it in **\$n** or **\$p**.
 - **Post-meeting note:** After discussing this issue further, it was decided that catalogers should continue to use **\$n** and **\$p**. Making the suggested changes would involve non-standard cataloging practices and would need Advisory Committee approval since it could have a major impact on future merging/de-duplication projects.
 - Some AV items are repackaged by a distributor whose name appears on the packaging; however, all of the cataloging-related information (e.g., ISBN, publisher, publication date) on the item refers to the original publisher.
 - Add additional **\$a** and **\$b** to the **260** tag to include the distributor information.
 - If the information is available, add an **028** tag for the original **publisher** and an additional **028** tag for the **distributor**.
 - If there are different publication dates, the repackaged item will require a separate bib record.
 - Series in 245 tag
 - Ruth is checking cataloging manuals for the preferred entry format (i.e., including the series in the title or not) and will post an answer to the listserv soon.
 - Z39.50 sites
 - Several SC LENDS libraries have requested adding more Z39.50 sites to the current list, and CatWoG members supported this request.
 - Send suggestions for sites to add to **Rogan (rhamby@florencelibrary.org)** and/or post them to the listserv.

- A target list of Z39.50 sites is available on **IRSpy** (<http://irspy.indexdata.com/>) under the **Show Targets** section.
 - **Post-meeting note:** Rogan has determined that it will be easier to add additional Z39.50 sites after SC LENDS upgrades to Evergreen version 1.6.1 in October. He will be able to add the sites himself instead of having to go through ESI which is the way the process has to be done in the current version.
- 856 tags
 - May be important for e-books but can probably be deleted in other instances.
 - Decision about whether or not the tags should remain on or be added to e-book bib records will be determined at a later date.
- Punctuation problems
 - Some catalogers have noted display errors with punctuation, but the cause of the problem has not been determined.
 - Please send screen shots of these to **Lynn (lfloyd@andersonlibrary.org)** and **Shasta (shasta.brewer@yclibrary.net)**.
- Unique merges
 - Make a screen print and send to Shasta. She will keep a file containing these and will handle any additional merges with these items as new libraries join SC LENDS.
 - If you have a question as to whether or not something is a unique merge, please contact Shasta.
- Ruth provided a handout listing websites that catalogers may find useful.

VIII. Next meeting
TBA

Respectfully submitted,
Ruth Canfield